

# Exhibit 10

1001 College Court (28562)  
Post Office Box 867  
New Bern, NC 28563-0867

P: 252.672.5471  
F: 252.672.5477  
apd@wardandsmith.com

February 7, 2023

**CONFIDENTIAL COMMUNICATION (FRE 408)**

VIA EMAIL ONLY (*emhaas@michaelbest.com*)

Emily M. Haas  
Michael Best & Friedrich LLP

RE:    FORMA Rebrand  
      WS File: 220428-00003; MBF File: 221943-5001

Emily:

As you know, we represent Forma AI Inc. ("Forma") in connection with protecting and enforcing its rights in the FORMA.AI mark. As you also know, following our exchanges,<sup>1</sup> Forma and your client, Twic, Inc. ("Twic"), attempted to amicably resolve the ongoing trademark infringement matter business-to-business. Those efforts failed to result in resolution. Forma requested we make one final attempt at resolving the ongoing consumer confusion and damage to Forma's rights before proceeding with formal legal action.

Forma has repeatedly provided Twic with clear evidence of actual consumer confusion since at least as early as April 18, 2022; yet, Twic has – with each response<sup>2</sup> – failed to cooperate or offer any reasonable resolution. Forma, at Twic and a mutually known investor's request, was even willing to work directly with Twic to (1) amicably discuss Twic's use of the FORMA mark ("Mark") and (2) reach a reasonable business solution. Twic's most recent response,<sup>3</sup> that Twic is working "diligently on training [its] customers on the proper company contacts" is not an acceptable solution nor has this approach been sufficient in preventing instances of actual confusion. To the contrary, Twic's continued use of the Mark for its software platform, all while slighting Forma's efforts to resolve this matter, has caused – and continues to cause – actual consumer confusion,<sup>4</sup> and amounts to, among other claims, willful trademark infringement.

Enclosed is an index of eighteen (18) instances of actual consumer confusion, resulting from Twic's careless decision to adopt the Mark and refusal to respect Forma's rights. The Index organizes instances of actual consumer confusion already provided and instances that have

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<sup>1</sup> Counsel for Forma communications set forth in Index, with instances of actual confusion in Exhibits 1-18.

<sup>2</sup> Counsel for Twic responded by April 29, 2022 and May 26, 2022 letters, without addressing the confusion.

<sup>3</sup> Email correspondence from Twic's CEO Jason Fan to Forma's Nabeil Alazzam of December 24, 2022.

<sup>4</sup> Eight (8) occurring since December 2022.

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occurred since our last exchange – including instances that occurred *after* Twic's so-called training efforts. (See *Index and Exhibits 1-18*).

These instances of actual confusion include Twic customers with a Twic platform account, Twic customer's HR professionals responsible for selecting benefit and compensation platforms, a Forma competitor familiar with the industry and its software platforms, and, most recently, one of Twic's own employees. This type of actual consumer confusion, confusion by those most familiar with Twic and the HR industry, is significant and demonstrates the overlap in the services, similarity of the marks, and inability for even the most industry knowledgeable consumers to distinguish Twic and Forma's services. Twic's actions have caused, and continue to cause, harm to Forma's brand and violate its trademark rights.

Twic's continued refusal to respect Forma's trademark rights, and the ongoing actual consumer confusion, leaves Forma with no option but to protect its rights through more formal legal procedures. Forma is fully prepared to protect and enforce its rights, but in the spirit of moving the parties towards an amicable resolution, Forma authorized us to send this letter with a final opportunity to resolve this matter before Twic will be forced to defend its wrongful and infringing conduct in court. Forma did not make the decision to move towards litigation lightly, it is Twic's conduct as a repeat infringer and Twic's failure to cooperate in the negotiation of a reasonable business solution that necessitated Forma's consideration of a lawsuit. Forma is no longer interested in Twic's ineffective whack-a-mole approach to each instance of consumer confusion, nor is it interested in continuing any discussions with Twic directly as they have been fruitless and excessively dragged out.

Accordingly, Forma reiterates its demand that Twic (1) agree to cease and desist use of the "Forma" name or any other name that is substantially similar and/or likely to cause confusion and propose a phase-out plan; (2) voluntarily transfer ownership of joinforma.com domain to Forma; and (3) expressly abandon the Mark and its accompanying federal trademark application with the U.S. Patent and Trademark Office; (U.S. Serial No. 97/268,559).

If we do not receive the above written confirmations by **February 17, 2023**, the next communication will include a courtesy copy of a complaint for trademark infringement. We will also be filing an opposition to the registration of U.S. Application Serial No. 97/268,559 with the Trademark Trial and Appeal Board.

*All rights and remedies expressly reserved.*

Emily M. Haas  
February 7, 2023  
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Yours truly,

*/Angela P. Doughty/*

Angela P. Doughty

cc: Joseph A. Schouten (*jas@wardandsmith.com*)  
Erica B. E. Rogers (*ebrogers@wardandsmith.com*)

ND:4894-6684-4232

Enclosures



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## INDEX

### EVIDENCE OF ACTUAL CONSUMER CONFUSION

#### **Exhibit 1 – April 18, 2022 Letter**

- 1.1. Date: On or around April 17, 2022
- 1.2. Sent to Twic: Exhibit A to April 18, 2022 Letter
- 1.3. Description: Medhealth Outlook posted about Twic's rebrand on LinkedIn's platform tagging Forma, which creates the false belief that Twic and Forma are somehow associated. [https://www.linkedin.com/posts/medhealth-outlook\\_forma-raises-40-million-in-series-b-plans-activity-6907803329532186625-yGdY/?utm\\_source=linkedin\\_share&utm\\_medium=member\\_desktop\\_web](https://www.linkedin.com/posts/medhealth-outlook_forma-raises-40-million-in-series-b-plans-activity-6907803329532186625-yGdY/?utm_source=linkedin_share&utm_medium=member_desktop_web)

#### **Exhibit 2 – May 12, 2022 Letter**

- 2.1. Date: May 4, 2022 and May 11, 2022
- 2.2. Sent to Twic's Counsel: Exhibit D to May 12, 2022 Letter
- 2.3. Description: Misdirected communication from Twic's customer Rubrik inquiring about its Twic account, further illustrating ongoing customer confusion.

#### **Exhibit 3 – June 14, 2022 Letter**

- 3.1. Date: On or around June 11, 2022
- 3.2. Sent to Twic's Counsel: Enclosure 1 to June 14, 2022 Letter
- 3.3. Description: Sammy Totah of BOCA Communications post on LinkedIn's platform tagging Forma and falsely associating Forma with Twic's founder, Jason Fan, and the services and business activities of Twic.  
<https://www.linkedin.com/feed/update/urn:li:activity:6940009037405057024>

#### **Exhibit 4**

- 4.1. Date: June 23, 2022
- 4.2. Sent to Twic's Counsel: June 23, 2022 Email
- 4.3. Description: Misdirected communication from Twic's customer Angela McCole of Grammarly, inquiring about its Twic account.

#### **Exhibit 5**

- 5.1. Date: June 27, 2022
- 5.2. Sent to Twic's Counsel: June 28, 2022 Email
- 5.3. Description: Misdirected communication from Twic's customer Bei Zhang of Grammarly, inquiring about its Twic account.

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**Exhibit 6**

- 6.1 Date: June 30, 2022
- 6.2 Sent to Twic's Counsel: July 1, 2022 Email
- 6.3 Description: Misdirected communication from Twic's customer Olena Matokhina of Grammarly, inquiring about its Twic account.

**Exhibit 7**

- 7.1 Date: July 1, 2022
- 7.2 Sent to Twic's Counsel: July 6, 2022 Email
- 7.3 Description: Misdirected communication from Twic's customer Nichole O'Such of Liftoff + Vungle, inquiring about its Twic account.

**Exhibit 8**

- 8.1 Date: July 14, 2022
- 8.2 Sent to Twic's Counsel: July 15, 2022 Email
- 8.3 Description: Misdirected communication from Twic's customer Elisabeth Zarate of Rubrik, inquiring about its Twic account.

**Exhibit 9**

- 9.1 Date: July 14, 2022
- 9.2 Sent to Twic's Counsel: July 15, 2022 Email
- 9.3 Description: Second misdirected communication from Twic's customer Elisabeth Zarate of Rubrik, inquiring about its Twic account.

**Exhibit 10**

- 10.1 Date: December 2022
- 10.2 Description: Post on LinkedIn's platform tagging Forma and falsely associating Forma with and the services and business activities of Crosschq.

**Exhibit 11**

- 11.1 Date: December 7, 2022
- 11.2 Description: Misdirected communication from Sean Netsai of Clari, inquiring about its Twic account.

**Exhibit 12**

- 12.1 Date: December 20, 2022
- 12.2 Description: Misdirected communication from Twic's customer Natasha Inniss of Clever, inquiring about its Twic account.

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**Exhibit 13**

- 13.1 Date: December 21, 2022
- 13.2 Description: Misdirected communication from Twic's customer Lauren Clasper of National Wildlife Federation, inquiring about its Twic account.

**Exhibit 14**

- 14.1 Date: December 23, 2022
- 14.2 Description: Misdirected communication from Twic's customer Vijay Harihara Iyer Sankar of Rubrik, inquiring about its Twic account.

**Exhibit 15**

- 15.1 Date: December 29, 2022
- 15.2 Description: Misdirected voicemail communication from Robert Raitz, confused as to whether or not Forma purchased Twic.

**Exhibit 16**

- 16.1 Date: January 11, 2023
- 16.2 Description: Misdirected voicemail communication from Hope Denton, confusing Forma as the source of Twic's services.

**Exhibit 17**

- 17.1 Date: January 14, 2023
- 17.2 Description: Post on LinkedIn's platform by a Forma competitor that falsely associates Forma with CaptivateIQ, Notion, and Ironclad.

**Exhibit 18**

- 17.1 Date: February 7, 2023
- 17.2 Description: Post on LinkedIn's platform by a Twic employee – Kelly Huang – that falsely associates her employment with Forma instead of Twic.

## **EXHIBIT 1**

1001 College Court (28562)  
Post Office Box 867  
New Bern, NC 28563-0867

P: 252.672.5471  
F: 252.672.5477  
apd@wardandsmith.com

April 18, 2022

CERTIFIED MAIL  
RETURN RECEIPT REQUESTED

VIA EMAIL (*info@joinforma.com*)

Mr. Jason Fan, CEO  
Twic, Inc.  
47000 Warm Springs Blvd, Ste 1-170  
Fremont, California 94539

RE: FORMA Rebrand  
Our File 220428-00003

Dear Mr. Fan,

We represent Forma AI Inc. ("Forma"), an international sales performance and management solutions company and provider of the FORMA.AI software platform.<sup>1</sup> It recently came to our client's attention that (i) on February 15, 2022 Twic, Inc. ("Twic") applied to register FORMA with the U.S. Patent and Trademark Office ("USPTO") in relation to an employee benefits software platform (U.S. Serial Number 97/268,559) ("Application") and (ii) on March 8, 2022 publically announced its rebrand from Twic to Forma.<sup>2</sup> The purpose of this letter is to (a) advise Twic that use of the FORMA name in the proposed manner violates Forma's pre-existing trademark rights, and (b) reach out to structure discussions around transitioning Twic away from the Forma name in a commercially reasonable manner, including withdrawing the Application.

Forma is the exclusive owner of the FORMA.AI mark in connection with business consultation, business collaboration services, and software services in the field of sales performance and compensation management, including sales territory design, quota management, employee loyalty, revenue productivity, and benchmarking practices ("Services"). Forma has used the FORMA.AI mark in connection with the Services since at least as early as 2016, and in commerce throughout the U.S. in relation to its business services and software platform since at least as early as October 2017 and September 2018, respectively. As a result of Forma's longstanding, continuous use of the FORMA.AI mark,

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<sup>1</sup> See Form AI Inc.'s website, available via <https://www.forma.ai/>.

<sup>2</sup> See Twic's March 8, 2022 announcement, available at <https://www.joinforma.com/resources/twic-rebrands-forma-transforming-employee-benefits>.

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the FORMA.AI mark has become exclusively associated with Forma and represents substantial, valuable goodwill. Forma applied to federally register its rights in the FORMA.AI name on April 1, 2022 (U.S. Serial Numbers 97/342,971 and 97/342,837).

Twic's use of the FORMA mark for employee management software services has caused,<sup>3</sup> and is likely to continue to cause, consumer confusion and violates Forma's pre-existing trademark rights.<sup>4</sup> While we can appreciate the industry focus on employee *benefits* management versus employee *performance and compensation* management, the compared services need not be identical or even competitive for purposes of finding a likelihood of confusion under trademark law – only a degree of relatedness between the compared services can cause marketplace confusion, particularly given the identical use of the wording FORMA. The business services and software services marketed by Twic on the joinforma.com website are highly related to Forma's Services. As a result, Forma is justifiably concerned that consumers have been – and will continue to be – confused – *e.g.*, that consumers will falsely believe that Twic's platform is associated with Forma's services and platform or that Twic's platform is a new expansion of Forma's existing services and platform.

Therefore, Forma must request that Twic reconsider its decision to rebrand to the FORMA mark, including, but not limited to:

1. Ceasing use of the FORMA mark and any other designations likely to cause confusion with the FORMA.AI mark;
2. Abandoning the pending Application to register the FORMA mark; and
3. Relinquishing or transferring to Forma the domain name joinforma.com and any other social media accounts or handles incorporating the word "forma."

Forma further requests that Twic contact us with written confirmation of Twic's willingness and plans for a commercially reasonable transition strategy to move away from the Forma name no later than **Friday, April 29, 2022**. Forma is prepared to take the steps necessary to protect its valuable trademark rights, but prefers to resolve this matter in a reasonable and amicable manner.

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<sup>3</sup> Medhealth Outlook posted about Twic's rebrand on LinkedIn's platform tagging Forma, which creates the false belief that Twic and Forma are somehow associated. [https://www.linkedin.com/posts/medhealth-outlook\\_forma-raises-40-million-in-series-b-plans-activity-6907803329532186625-yGdY/?utm\\_source=linkedin\\_share&utm\\_medium=member\\_desktop\\_web](https://www.linkedin.com/posts/medhealth-outlook_forma-raises-40-million-in-series-b-plans-activity-6907803329532186625-yGdY/?utm_source=linkedin_share&utm_medium=member_desktop_web), Exhibit A.

<sup>4</sup> We enclose a screenshot of the Application and screenshot from the infringing website, Exhibits B and C.

Mr. Jason Fan, CEO

April 18, 2022

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*The above is not an exhaustive statement of all of the relevant facts and law. All rights and remedies, including without limitation the right to sue for trademark infringement pursuant to the Lanham Act 15 U.S.C. § 1051 et. seq., are expressly reserved by Forma AI Inc.*

Yours truly,

*/Angela P. Doughty/*

Angela P. Doughty

cc: Erica B. E. Rogers (via email)

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**Exhibit A**





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## Exhibit B

**United States Patent and Trademark Office**  
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**Word Mark** FORMA

**Goods and Services** IC 042. US 100 101. G & S: Non-downloadable technology platform for human resource professionals to offer personalized employee benefits, healthcare benefits, insurance benefits and lifestyle benefits to employees

**Mark Drawing Code** (3) DESIGN PLUS WORDS, LETTERS, AND/OR NUMBERS

**Design Search Code** 26.01.16 - Circles touching or intersecting  
26.01.21 - Circles that are totally or partially shaded.  
26.01.31 - Circles - five or more ; Five or more circles

**Serial Number** 97268559

**Filing Date** February 15, 2022

**Current Basis** 1B

**Original Filing Basis** 1B

**Owner** (APPLICANT) Twic, Inc. CORPORATION DELAWARE 47000 Warm Springs Blvd, Ste 1-170 Fremont CALIFORNIA 94539

**Attorney of Record** Angela C. Wilcox

**Description of Mark** The color(s) blue, orange, pink, yellow is/are claimed as a feature of the mark. The mark consists of a pixel design.

**Type of Mark** SERVICE MARK

**Register** PRINCIPAL

**Live/Dead Indicator** LIVE

[TESS HOME](#) | [NEW USER](#) | [STRUCTURED](#) | [FREE FORM](#) | [BROWSE DCT](#) | [SEARCH OG](#) | [TOP](#) | [HELP](#) | [PREV LIST](#) | [CURR LIST](#) | [NEXT LIST](#) | [FIRST DOC](#) | [PREV DOC](#) | [NEXT DOC](#) | [LAST DOC](#)

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**Exhibit C**

<https://www.joinforma.com/why>


April webinar with Josh Bersin, register [here](#)

**forma** [Why Forma](#) [Life Benefits](#) [Customers](#) [Resources](#) [About Us](#) [Sign In](#) [Talk to an Expert](#)

# Benefits programs that work the way you do

Design and deliver flexible, inclusive, and global benefits programs at every scale in a modern way.

All made possible by a platform that does the hard work for you, letting your team focus on the human touch—instead of dealing with point solutions and painful processes.



## ① Design and customize your program

Select from a variety of ready-to-run life benefits programs that best match your strategy and coverage needs, including flexible funding options, whether pre-tax, employer-, or employee-sponsored. Then once you've established customized spending accounts, sit back and let your employees set up their personalized benefits.

### Create Program

175 Categories

Eligible Categories

<input checked="" type="checkbox"/> Adoption	0/2	<input type="checkbox"/> Remote Work	0/5
<input checked="" type="checkbox"/> Caregiving	0/2	<input type="checkbox"/> Commuter	0/2
<input type="checkbox"/> Wellness	0/5		
<input type="checkbox"/> Food Subsidy	0/2		

#### Program Details

Plan Type: Wellness

Start Date: MM/DD/YYYY

Plan Year: ☒ Fiscal ☐ Calendar

## **EXHIBIT 2**

1001 College Court (28562)  
Post Office Box 867  
New Bern, NC 28563-0867

P: 252.672.5471  
F: 252.672.5477  
apd@wardandsmith.com

May 12, 2022

**CONFIDENTIAL COMMUNICATION (FRE 408)**

VIA EMAIL ONLY ([awilcox@wilcoxip.com](mailto:awilcox@wilcoxip.com))

Ms. Angela C. Wilcox  
Wilcox IP, P.C.  
20 North Wacker, Suite 1000  
Chicago, Illinois 60606

RE: FORMA Rebrand  
Our File 220428-00003

Dear Ms. Wilcox,

We confirm receipt of your April 29, 2022 letter on behalf of Twic, Inc. ("Twic") ("Response Letter"), responding to our April 18, 2022 letter on behalf of Forma AI Inc. ("Forma") ("Demand Letter"). Forma reiterates its request that Twic cease use of and rebrand away from the Forma name, including withdrawing the Application.

*First*, and most importantly, there are and continue to be instances of actual consumer confusion substantiating our assertions of likelihood of confusion and documenting the violations of Forma's trademark rights. We enclosed as Exhibit A to the Demand Letter one such example - Medhealth Outlook's post about Twic's rebrand on LinkedIn's platform while tagging Forma. The Response Letter completely fails to address the actual confusion evidenced in Exhibit A.

*Furthermore*, we enclose as Exhibit D yet another example of actual consumer confusion – the first correspondence occurring between the dates of the Demand Letter and Response Letter – wherein a Twic customer reached out to Forma<sup>1</sup> twice inquiring about its Twic account. These instances further illustrate the ongoing consumer confusion and highlight the need for Twic to immediately cease use of and rebrand away from the Forma name. As Twic's customer is clearly confused as to the source of its services and/or affiliation between our clients, we request that Twic immediately reach out to its customer to correct this issue.

*Second*, Forma's active and ongoing use of the FORMA.AI mark in the United States dates back to at least as early as October 2017. Twic's statement that Forma is "headquartered

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<sup>1</sup> Forma received the first communication on May 4, 2022 and then another communication on May 11, 2022.

Ms. Angela C. Wilcox  
May 12, 2022  
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in Toronto, Canada" and that "90% of its employees are located outside the United States" is irrelevant and does not undermine or diminish Forma's prior trademark rights in the United States. As you are aware, the geographic scope of Forma's rights are not where Forma or its employees are located – but where "the mark is both known and recognizable" by customers. We are not inclined to provide business sensitive documentation of Forma's U.S. customers at this time. The declaration of such use is available via the records of the U.S. Patent and Trademark Office.<sup>2</sup>

*Third*, as demonstrated by actual consumer confusion, we disagree that the ".AI" suffix or Twic's design element obviates the clear similarities between Twic's FORMA mark and Forma's FORMA.AI mark. The "forma" literal element is dominant in creating a commercial impression for the FORMA.AI mark.<sup>3</sup> The "forma" element is dominant, in part, because it is the first portion of the mark and consumers are inclined to focus on the first word of a mark.<sup>4</sup> The "forma" element is dominant, in other part, because it is the fanciful term, rather than the suggestive suffix "AI."<sup>5</sup> The suffix "AI" is suggestive of "artificial intelligence," as noted in the Response Letter. Yet, Twic utilized the twic.ai domain name, which now forwards to joinforma.com, indicating that artificial intelligence may also be a feature of Twic's software platform. Therefore, even if the ".AI" suffix had a significant impact on the commercial impression (which it does not), that impact would not be enough for consumers to distinguish between the source of software services that both feature artificial intelligence. These differences in the marks are simply not enough to avoid consumer confusion in the marketplace.

*Fourth*, while we reviewed the third-party registrations attached to the Response Letter, it is notable that none of the registrations are for software services with similar functions or used in similar industries as Twic and Forma. The overlap between the purpose and function of employee performance and compensation management software and employee benefit management software renders Twic's use of FORMA highly related and confusingly similar to Forma's pre-existing use of FORMA.AI. The overlap is further compounded by the same and overlapping industries.

*Moreover*, in addition to the function and industry dissimilarities, it is also notable that all but one of the cited registrations contain terms, prefixes, or suffixes in conjunction with

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<sup>2</sup> U.S. Serial Numbers 97/342,791 and 97/342,837.

<sup>3</sup> See *In re Viterra, Inc.*, 671 F.3d 1358, 1367, 101 USPQ2d 1905, 1912 (Fed. Cir. 2012) (citing *Interlego AG v. Abrams/Gentile Entm't, Inc.*, 63 USPQ2d 1862, 1863 (TTAB 2002)); TMEP §1207.01(b)(iv).

<sup>4</sup> *Palm Bay Imps., Inc. v. Veuve Clicquot Ponsardin Maison Fondée En 1772*, 396 F.3d 1369, 1372-73, 73 USPQ2d 1689, 1692 (Fed. Cir. 2005).

<sup>5</sup> See, e.g., *In re Dixie Rests., Inc.*, 105 F.3d 1405, 1407, 41 USPQ2d 1531, 1533-34 (Fed. Cir. 1997).

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"forma" making them more distinguishable in appearance and commercial impression than two users of FORMA and FORMA.AI. The one cited registration for Forma without any other terms, prefixes, or suffixes is not even registered in relation to software platforms, much less a software platform related to employee management. As shown in Exhibit B of the Response Letter, Twic and Forma appear to be the only users of "forma" for a software platform related to employee management. Consequently, the registrations identified in the Response Letter do not support the assertion of any "vast dilution" of the FORMA term.

*Ultimately*, while Forma appreciates Twic's willingness to enter into a coexistence agreement and not "take issue" with Forma's federal trademark applications (U.S. Serial Numbers 97/342,791 and 97/342,837), Forma remains concerned about the ongoing actual consumer confusion and likelihood for future confusion. Such confusion is damaging to both Twic and Forma, and, as it has occurred between the dates of the Demand Letter and Response Letter, will only continue to increase as time goes on. The amending of the identification of services in the Twic application for FORMA (U.S. Serial Number 97/268,559) (the "Application") is not a sufficient resolution as it does not address the concerns about ongoing consumer confusion.

To resolve this matter, and to protect the customers and brands of Twic and Forma, Forma must reiterate its request and further request that Twic:

1. Cease use of the FORMA mark and any other designations likely to cause confusion with the FORMA.AI mark;
2. Abandon the pending Application to register the FORMA mark;
3. Relinquish or transfer to Forma the domain name joinforma.com and any other domains, social media accounts, or handles incorporating the word "forma"; and
4. Immediately respond to Emily Yedinak of Rubrik to correct the confusion and provide us with confirmation that Twic has taken action to correct the confusion (*See Ex. D*).

We look forward to a response on the above requests no later than **Friday, May 20, 2022**.

*All rights and remedies expressly reserved.*

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**WARD AND SMITH, P.A.**

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Ms. Angela C. Wilcox

May 12, 2022

Page 4

Yours truly,

*/Angela P. Doughty/*

Angela P. Doughty

cc: Erica B. E. Rogers (via email)

Ms. Angela C. Wilcox  
May 12, 2022  
Page 5

## Exhibit D

### May 4, 2022 Misdirected Communication


**From:** Emily Yedinak <[emily.yedinak@rubrik.com](mailto:emily.yedinak@rubrik.com)>  
**Sent:** Wednesday, May 4, 2022 3:55:00 PM  
**To:** Nabeil Alazzam <[nabeil@forma.ai](mailto:nabeil@forma.ai)>; [jallen7735@gmail.com](mailto:jallen7735@gmail.com) <[jallen7735@gmail.com](mailto:jallen7735@gmail.com)>  
**Cc:** Natalie Cowden <[natalie@twic.ai](mailto:natalie@twic.ai)>  
**Subject:** Access Issue - Jeremy Allen

#### EXTERNAL EMAIL

Hi Forma Support Team,

Jeremy Allen (included on this thread) will be officially terminated as of June 3rd; however he no longer has access to SSO or his Rubrik email. Can you help him access his account so he can submit claims prior to his 6/3 termination?

Thank you!

 **rubrik** | Emily Yedinak  
Senior Benefits Analyst at Rubrik  
E [emily.yedinak@rubrik.com](mailto:emily.yedinak@rubrik.com) M 650-781-0228 W [www.rubrik.com](http://www.rubrik.com)  
A 3495 Deer Creek Road Palo Alto, CA 94304

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 The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

### May 11, 2022 Misdirected Communication

**From:** Emily Yedinak <[emily.yedinak@rubrik.com](mailto:emily.yedinak@rubrik.com)>  
**Date:** Wednesday, May 11, 2022 at 7:27 AM  
**To:** Nabeil Alazzam <[nabeil@forma.ai](mailto:nabeil@forma.ai)>  
**Cc:** Natalie Cowden <[natalie@twic.ai](mailto:natalie@twic.ai)>; [jallen7735@gmail.com](mailto:jallen7735@gmail.com) <[jallen7735@gmail.com](mailto:jallen7735@gmail.com)>  
**Subject:** Re: Access Issue - Jeremy Allen

#### EXTERNAL EMAIL

Hi Forma,

Can someone please follow up on this?


Emily

On Wed, May 4, 2022 at 1:55 PM Emily Yedinak <[emily.yedinak@rubrik.com](mailto:emily.yedinak@rubrik.com)> wrote:

Hi Forma Support Team,

Jeremy Allen (included on this thread) will be officially terminated as of June 3rd; however he no longer has access to SSO or his Rubrik email. Can you help him access his account so he can submit claims prior to his 6/3 termination?

Thank you!

 **rubrik** | Emily Yedinak  
Senior Benefits Analyst at Rubrik  
E [emily.yedinak@rubrik.com](mailto:emily.yedinak@rubrik.com) M 650-781-0228 W [www.rubrik.com](http://www.rubrik.com)  
A 3495 Deer Creek Road Palo Alto, CA 94304

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## **EXHIBIT 3**

1001 College Court (28562)  
Post Office Box 867  
New Bern, NC 28563-0867

P: 252.672.5471  
F: 252.672.5477  
apd@wardandsmith.com

June 14, 2022

**CONFIDENTIAL COMMUNICATION (FRE 408)**

VIA EMAIL ONLY (*emhaas@michaelbest.com*)

Emily M. Haas, Esq.  
Michael Best & Friedrich LLP  
790 N. Water Street, Suite 2500  
Milwaukee, WI 53202

RE:    FORMA Rebrand  
      Our File 220428-00003; Your File 221943-5001

Dear Ms. Haas,

We reviewed your May 26, 2022 letter ("Second Response Letter") on behalf of Twic, Inc. ("Twic"), which responds to our April 18, 2022 and May 12, 2022 letters on behalf of Forma AI Inc. ("Forma") ("Demand Letters"). We write to respond.

First, as anticipated, the consumer confusion between Twic and Forma continues. Enclosed is yet another instance – the third since Twic began its rebrand less than 3 months ago – evidencing the consumer confusion being created by Twic's continued infringing use of the FORMA name.

Second, the letter dated April 29, 2022 on behalf of Twic ("First Response Letter") attempts to distinguish between Forma's FORMA.AI mark and Twic's infringing FORMA mark on the basis that "the inclusion of the AI term" is unique to Forma. However, this argument is undercut by Twic's use of "forma ai" and "forma.ai" as keywords in its search engine optimization efforts for the joinforma.com website. Twic cannot have it both ways. Twic is either of the position that the "ai" portion is a distinguishing factor (and thereby Twic should not use "forma ai" and "forma.ai" as keywords) or Twic is admitting "ai" is a descriptive term insufficient to serve as a distinguishing factor between the FORMA and FORMA.AI names (and thus admits our client's uses are identical).

Third, as requested, enclosed is geographic-specific evidence substantiating Forma's senior trademark rights in the United States. This documentation also clearly supports the declarations made in its federal trademark applications filed with the U.S. Patent and Trademark Office and questioned in the Second Response Letter.

Ms. Emily M. Haas  
June 14, 2022  
Page 2

Please find enclosed redacted exemplary documentation, as follows:

- Enclosure 1: Sammy Totah of BOCA Communications post on LinkedIn's platform tagging Forma and falsely associating Forma with Twic's founder, Jason Fan, and the services and business activities of Twic. <https://www.linkedin.com/feed/update/urn:li:activity:6940009037405057024/>;
- Enclosure 2: Redacted Keyword SEO Data;
- Enclosure 3: Table of Sample SaaS Customer Agreements for some of the first customer transactions in the relevant jurisdiction by date and location;
- Enclosures 4-16: Samples of Redacted SaaS Customer Agreements; and
- Enclosure 17: Table of Direct Marketing Campaigns containing dates of first customer meetings, conference participation, and direct proposal meetings in the relevant jurisdiction by date and location.

As proposed, this documentation is provided on a confidential, attorneys' eyes only basis. Such confidentiality extends to preserving the confidential nature of the city and state of the relevant client contracts.

Fourth, please advise immediately if Twic has or intends to correct the instances of consumer confusion referenced in the May 12, 2022 Demand Letter. The Second Response Letter appears to await evidence of Forma's prior use in or around Palo Alto, CA, the location of Rubrik. The enclosures substantiate Forma's senior trademark rights in California, and specifically, in San Francisco, CA. *See* Enclosure 6. As you are no doubt aware, Palo Alto is in California's San Francisco Bay Area.

Lastly, Forma reiterates the demands that Twic (1) cease and desist use of the FORMA mark, (2) transfer ownership of joinforma.com domain to Forma and (3) abandon its application for FORMA (U.S. Serial Number 97/268,559). Forma further demands that Twic, should it continue to dispute Forma's clearly demonstrated trademark rights, (4) likewise provide any geographic-specific evidence it has, if any, of its claimed trademark rights in the FORMA mark.

Forma endeavors to respect the trademark rights of others. Forma expects its trademark rights will similarly be respected by Twic.

*All rights and remedies expressly reserved.*

---

**WARD AND SMITH, P.A.**

---

Ms. Emily M. Haas  
June 14, 2022  
Page 3

We look forward to hearing from you soon, no later than **Wednesday, June 28, 2022.**

Yours truly,

*/Angela P. Doughty/*

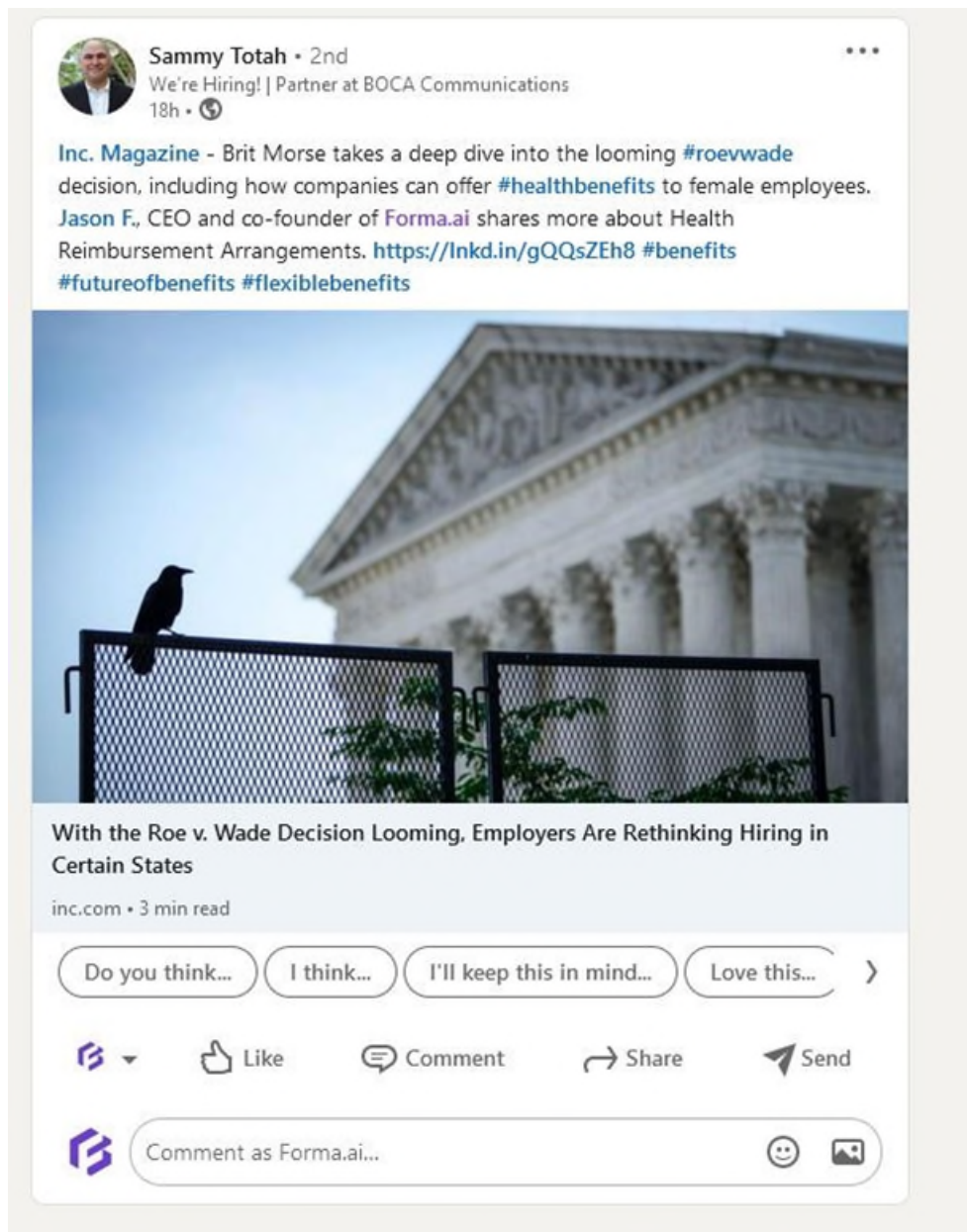
Angela P. Doughty

cc: Michelle E. Kouba, Michael Best & Friedrich LLP  
Lisa M. Harris, Michael Best & Friedrich LLP  
Erica B. E. Rogers, Ward and Smith, P.A.

Enclosures

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 1**



Ms. Emily M. Haas  
June 14, 2022  
Page 5

**Enclosure 2**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

	A	B	C	D	E	F	G	H
1	Keyword	forma.ai	joinforma.com	Search Volume	Keyword Difficulty	CPC	Competition	Results
2	forma	19	1	14800	51	1.22	0.01	7270000000
3								
4								
5	forma ai	1	14	170	33	4.99	0.01	3470000000
6	forma.	17	2	170	46	1.22	0.01	7450000000
7								
8								
9								
10								
11								
12	forma.ai	1	19	50	49	4.5	0.02	2770000000
13								
14								
15								
16								
17								
18								

Ms. Emily M. Haas

June 14, 2022

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**Enclosure 3**

**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

<b>Customer Name</b>	<b>Contract Date</b>	<b>Jurisdiction of Customer</b>
	1-Sep-18	Texas
	15-Jan-19	North Carolina, Texas
	1-Jul-19	California
	1-Sep-19	Arizona
	1-Feb - 20	Minnesota
	1-May-20	California
	1-Jun-20	California
	30-Jun-21	Denmark
	30-Aug-21	Indiana
	30-Sep-21	California
	4-Nov-21	Illinois
	24-Jan-22	Pennsylvania
	30-Mar-22	California
	31-Mar-22	Ontario
	31-Mar-22	California

Ms. Emily M. Haas  
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Page 7

**Enclosure 4**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**



**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of September 1, 2018 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED], (the “**Customer**”), with its principal place of business located at [REDACTED], Houston, TX [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.



Ms. Emily M. Haas  
June 14, 2022  
Page 8

**Enclosure 5**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**



**Forma AI SaaS Agreement**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the "**Agreement**") is entered into as of January 15, 2019 ("**Effective Date**"), between Forma AI Inc. ("**Forma**"), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED] (the "**Customer**"), with its principal place of business located at [REDACTED] Dallas, TX [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a "**Party**" and jointly as the "**Parties**".

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 6**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

DocuSign Envelope ID: 7624F8C1-779C-46F9-965D-85A374BCD47C



**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of July 1, 2019 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED], San Francisco, CA [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

Ms. Emily M. Haas  
June 14, 2022  
Page 10

**Enclosure 7**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**



**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of September 1, 2019 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED]s (the “**Customer**”), with its principal place of business located at [REDACTED], Jonesboro, AR [REDACTED] USA. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

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June 14, 2022  
Page 11

**Enclosure 8**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of February 1, 2020 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED] Bloomington, MN [REDACTED]. Each of Forma and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement and the exhibits attached hereto which are deemed made part of this Agreement, sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) the Forma Services and other consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 9**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**  
**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of May 1, 2020 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 386 Berkeley St, Toronto ON, M5A 2X7, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED], San Mateo, CA [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

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**Enclosure 10**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

DocuSign Envelope ID: 5E0E5044-A743-4D77-8987-DCCCEAF46D89



**Software as a Service Agreement**

**THIS SOFTWARE AS A SERVICE AGREEMENT ("Agreement")** is made and effective as of **June 1, 2020 ("Effective Date")**

**BETWEEN:** [REDACTED] a Delaware corporation, having a place of business at [REDACTED] San Rafael, CA

**AND:** Forma AI Inc., a Canadian corporation, having a place of business at Suite #100, 862 Richmond Street West, Toronto, ON, Canada ("**Supplier**").

THE PARTIES HERETO AGREE TO THE FOLLOWING TERMS AND CONDITIONS:

...

DocuSign Envelope ID: 5E0E5044-A743-4D77-8987-DCCCEAF46D89



**Software as a Service Agreement**

connection with the provision, receipt and use of the SaaS Solution, together with all corrections, improvements, updates and releases thereof.

1.27. "**Supplier Agents**" means the agents, subcontractors and representatives of Supplier that have been pre-approved by [REDACTED] in writing who provide some or all of the SaaS Solution.

1.28. "**Supplier IP**" means the IP used in connection with the provision of the SaaS Solution that is (a) owned, acquired or developed by Supplier or (b) licensed, leased or otherwise obtained by Supplier from a third party (other than [REDACTED] or [REDACTED] Agents). For clarity, the Supplier IP includes the SaaS Software, and all related Documentation.

1.29. "**Supplier Data**" means all information and data that is: (a) owned, acquired or developed by Supplier; or (b) licensed



Ms. Emily M. Haas  
June 14, 2022  
Page 14

**Enclosure 11**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of **August 30<sup>th</sup>, 2021** between Forma AI Inc. (“**Forma**”), with its principal place of business located at **82 Peter Street, Toronto, ON M5V 2G5**, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED] **Carmel, IN** [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

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**Enclosure 12**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**



**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the "**Agreement**") is entered into as of **September 30, 2021** between Forma AI Inc. ("**Forma**"), with its principal place of business located at **82 Peter Street, Toronto, ON M5V 2G5**, and [REDACTED] the "**Customer**", with its principal place of business located at [REDACTED] **Mountain View, CA, [REDACTED]** Each of Forma AI and Customer shall individually be referred to as a "**Party**" and jointly as the "**Parties**".

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting,



Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 13**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of **November 4 2021** (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at 82 Peter Street Suite 300, Toronto, ON, M5A 2X7 Canada, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED] [REDACTED] Chicago, IL, [REDACTED], USA. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 14**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**MASTER SERVICES AGREEMENT**

This Master Services Agreement ("Agreement") is entered into as of 2022 / 01 / 24 ("Effective Date") between [REDACTED] on behalf of itself and each of its affiliates (collectively "ERT"), a Delaware Corporation with a place of business at [REDACTED] Philadelphia, PA [REDACTED] and Forma AI US Inc ("Vendor") a Delaware Corporation with a place of business at 251 Little Falls Drive, Wilmington, Delaware, 19808, USA.

**Preliminary Statements**

WHEREAS, Vendor desires to provide [REDACTED] with services from time to time related to clinical trials (the "Services"); and

WHEREAS, [REDACTED] desires to engage Vendor to provide [REDACTED] with the Services as more fully described in this Agreement and the supporting exhibits.

NOW THEREFORE, in consideration of the foregoing premises and the mutual covenants contained

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 15**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of **March 30 2022** (“**Effective Date**”), between Forma AI US Inc. (“**Forma**”), with its principal place of business located at **251 Little Falls Drive, Wilmington, Delaware, [REDACTED] USA** and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED] **Newark, CA, [REDACTED] USA**. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting, training and other professional services made available by Forma in respect of the Forma AI SaaS Services.

Ms. Emily M. Haas  
June 14, 2022  
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**Enclosure 16**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

**FORMA AI SOFTWARE AS A SERVICE AGREEMENT:**

This Forma AI Software As A Service Agreement (the “**Agreement**”) is entered into as of 31 March 2022 (“**Effective Date**”), between Forma AI Inc. (“**Forma**”), with its principal place of business located at **82 Peter St, Toronto ON, M5V 2G5**, and [REDACTED] (the “**Customer**”), with its principal place of business located at [REDACTED] **Alameda CA** [REDACTED]. Each of Forma AI and Customer shall individually be referred to as a “**Party**” and jointly as the “**Parties**”.

This Agreement sets forth the terms and conditions that govern the provision and use of: (i) the Forma AI SaaS Services for incentive compensation design and administration; and (ii) consulting,

Ms. Emily M. Haas  
June 14, 2022  
Page 20

**Enclosure 17**  
**HIGHLY CONFIDENTIAL – ATTORNEYS' EYES ONLY**

<b>State</b>	<b>Date</b>
California	5/3/2017
California	5/31/2017
Connecticut	7/19/2017
Arizona	7/30/2017
Mississippi	8/9/2017
Ohio	8/16/2017
New Hampshire	8/16/2017
Virginia	8/30/2017
New York	9/3/2017
Massachusetts	9/8/2017
Texas	9/14/2017
Connecticut	10/4/2017
Wisconsin	10/10/2017
Vermont	11/7/2017
Utah	1/31/2018
Wisconsin	3/8/2018
California	3/29/2018
Maryland	3/31/2018
Pennsylvania	4/6/2018
Virginia	4/30/2018
New Jersey	5/8/2018
California	6/18/2018
Massachusetts	6/28/2018
Maryland	8/3/2018
Florida	8/6/2018
New York	8/6/2018
Florida	9/6/2018
New York	9/22/2018
Kentucky	10/9/2018
Wisconsin	10/18/2018
Connecticut	11/1/2018
New York	12/12/2018

ND:4865-8971-9843, v. 6

## **EXHIBIT 4**

**From:** Angela McCole <[angela.mccole@grammarly.com](mailto:angela.mccole@grammarly.com)>

**Sent:** Thursday, June 23, 2022 8:50 AM

**To:** Nabeil Alazzam; Jennifer Bullian

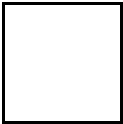
**Subject:** Forma Account Issues

**EXTERNAL EMAIL**

Hello,

I started Grammarly on May 2nd, 2022, and I am trying to access my forma account for both my monthly wellness reimbursement and new hire WFH reimbursement. When I try and submit my wellness claim, the app says my available balance is only \$22. I tried to do an in-app chat with support, and the virtual assistant referred to me as Val. Is it possible that my account is incorrectly linked to another employee? I'd appreciate any help you can provide!

--



**Angela McCole**

Product Chief of Staff | Grammarly  
San Francisco | Kyiv | New York | Vancouver | Berlin [We're hiring!](#)

## **EXHIBIT 5**



## Angela P. Doughty

---

**From:** Nabeil Alazzam <nabeil@forma.ai>  
**Sent:** Monday, June 27, 2022 7:37 PM  
**To:** Angela P. Doughty  
**Subject:** Fwd: Can I reimburse my daughter's swimming class expense to the quarterly quota?

---

**From:** Bei Zhang <bei.zhang@grammarly.com>  
**Sent:** Monday, June 27, 2022 7:35 PM  
**To:** Nabeil Alazzam  
**Subject:** Can I reimburse my daughter's swimming class expense to the quarterly quota?

---

### EXTERNAL EMAIL

---

Hi!

This is Bei from Grammarly. I'm working on reimburse the Q2 expense. Does it have to be my own expense, or can it be my family's expense such as my wife/daughter's gym cost?

Thanks!



**Bei Zhang**

Head of Marketing Analytics | Grammarly  
San Francisco | Kyiv | New York | Vancouver | Berlin We're hiring!

## **EXHIBIT 6**



---

**From:** Alona Matokhina <[olena.matokhina@grammarly.com](mailto:olena.matokhina@grammarly.com)>

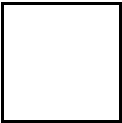
**Sent:** Thursday, June 30, 2022 7:06 PM

**To:** Nabeil Alazzam

**Subject:** My balances

**EXTERNAL EMAIL**

Hi, I've noticed that my balance on WFH is 0 but I didn't submit any claims and I should have \$200 per year. Could you please assist?



**Olena Matokhina**

Software Engineer | Grammarly

San Francisco | Kyiv | New York | Vancouver | Berlin [We're hiring!](#)

## **EXHIBIT 7**

## Angela P. Doughty


---

**From:** Michael Buchanan <michael.buchanan@forma.ai>  
**Sent:** Tuesday, July 5, 2022 6:54 PM  
**To:** Angela P. Doughty  
**Cc:** Nabeil Alazzam  
**Subject:** FW: Liftoff employee question

**Follow Up Flag:** Flag for follow up  
**Flag Status:** Flagged

---

**From:** Jeff Robinson <jeff.robinson@forma.ai>  
**Sent:** Tuesday, July 5, 2022 6:53 PM  
**To:** Andy O'Reilly <andy.oreilly@forma.ai>  
**Cc:** Michael Buchanan <michael.buchanan@forma.ai>  
**Subject:** RE: Liftoff employee question



---

### Jeff Robinson

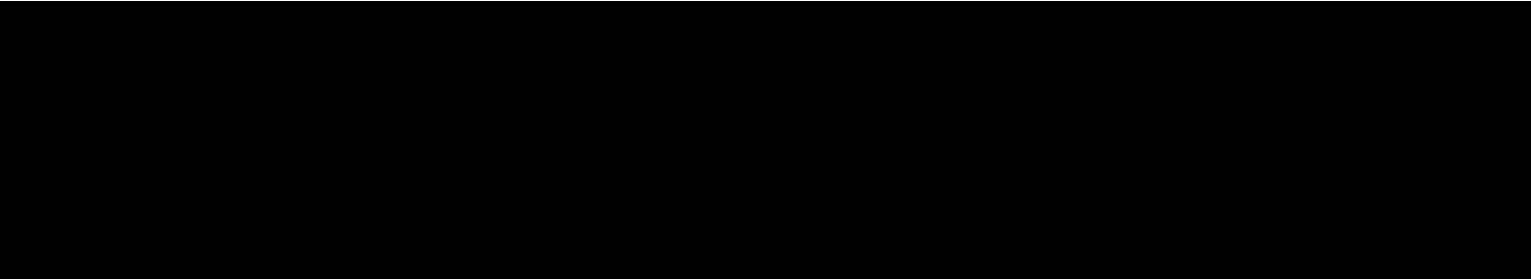
Business Development

[Forma.ai](#) | [628-209-6106](#)

[Book a meeting](#)

---

**From:** Andy O'Reilly <andy.oreilly@forma.ai>  
**Sent:** Tuesday, July 5, 2022 6:52 PM  
**To:** Jeff Robinson <jeff.robinson@forma.ai>  
**Cc:** Michael Buchanan <michael.buchanan@forma.ai>  
**Subject:** Re: Liftoff employee question



---

**From:** Jeff Robinson <jeff.robinson@forma.ai>  
**Sent:** Tuesday, July 5, 2022 1:29:15 PM  
**To:** Andy O'Reilly <andy.oreilly@forma.ai>  
**Cc:** Michael Buchanan <michael.buchanan@forma.ai>  
**Subject:** FW: Liftoff employee question

---

**Jeff Robinson**

Business Development

**Forma.ai** | [628-209-6106](tel:628-209-6106)

[Book a meeting](#)

---

**From:** Nichole O'Such <[nichole@liftoff.io](mailto:nichole@liftoff.io)>

**Sent:** Friday, July 1, 2022 9:49 PM

**To:** Jeff Robinson <[info@forma.ai](mailto:info@forma.ai)>

**Subject:** Liftoff employee question

---

**EXTERNAL EMAIL**

---

Hi! I submitted commuting expenses before EOM but they got rejected. Is there a support person I can work with to ensure they go through for June or should I just re-submit?

--

**Nichole O'Such**

Sales Lead at Liftoff + Vungle

**Phone** (319) 541-0819 **Email** [nichole@liftoff.io](mailto:nichole@liftoff.io)



## **EXHIBIT 8**

**Erica B. E. Rogers**


**From:** Benefits-EMEA <Benefits-EMEA@rubrik.com>  
**Sent:** Thursday, July 14, 2022 7:00 AM  
**To:** support@twic.ai; Nabeil Alazzam  
**Cc:** Denise Roeleveld; Elisabeth Zarate  
**Subject:** Re: Reimbursement

**EXTERNAL EMAIL**

Hi Forma Team,

We have noticed "James Hughes", Employee ID - 101901, has some issues with the reimbursement. Can you please confirm if the pending amount is reimbursed? sharing a screenshot for your reference.

Please treat this as an urgent request and share the details with us asap please.

 [Store](#) [Accounts](#) [Claims](#)

### Claims

New claims are usually processed within 72 hours after the submission, you will receive an email notifying the status of your claims.  
[Read Rubrik's program policy.](#)

Status: All Statuses + File claim

<b>£39.00 at Peloton</b> <span>Pending</span> · Wellness · 7/12/2022	Forma is reviewing your claim >
<b>£39.00 at Peloton</b> <span>Approved</span> · Wellness · 5/27/2022	£39.00 approved >
<b>£78.00 at Peloton</b> <span>Approved</span> · Wellness · 12/28/2021	£78.00 approved >
<b>£78.00 at Peloton</b> <span>Approved</span> · Wellness · 11/18/2021	£78.00 approved >

Regards,  
Benefits-EMEA

----- Forwarded message -----

**From:** Elisabeth Zarate <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>  
**Date:** Tue, Jul 12, 2022 at 10:49 AM  
**Subject:** Fwd: Reimbursement  
**To:** Benefits-EMEA <[benefits-emea@rubrik.com](mailto:benefits-emea@rubrik.com)>

Hi team,



Could you please verify if the amounts approved in Forma for James Hughes have been reimbursed? They don't seem to appear on the payslips.

Thanks

----- Forwarded message -----

From: **Elisabeth Zarate** <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>

Date: Tue, Jul 12, 2022 at 10:33 AM

Subject: Fwd: Reimbursement

To: Paolo Galano <[paolo.galano@rubrik.com](mailto:paolo.galano@rubrik.com)>

Hi Paolo,

Could you please check if James Hughes has been reimbursed in his payslips for the above please?

Thanks

----- Forwarded message -----

From: **James Hughes** <[james.hughes@rubrik.com](mailto:james.hughes@rubrik.com)>

Date: Tue, Jul 12, 2022 at 9:23 AM

Subject: Reimbursement

To: Elisabeth Zarate <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>

Hi Eli

Would you mind checking if this has been reimbursed? I'm sceptical.

Thanks! - James.

## Claims

New claims are usually processed within 72 hours after the submission, you will receive an email notifying the status of your claims.

[Read Rubrik's program policy.](#)

Status

All Statuses

[+ File claim](#)

£39.00 at Peloton	Forma is reviewing your claim >
Pending · Wellness · 7/12/2022	
£39.00 at Peloton	£39.00 approved >
Approved · Wellness · 5/27/2022	
£78.00 at Peloton	£78.00 approved >
Approved · Wellness · 12/28/2021	
£78.00 at Peloton	£78.00 approved >
Approved · Wellness · 11/18/2021	



rubrik

**James Hughes**

VP Sales Engineering & Enterprise CTO, EMEA at Rubrik

E [james.hughes@rubrik.com](mailto:james.hughes@rubrik.com) M +44 7970 390120 W [www.rubrik.com](http://www.rubrik.com)

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**ULTIMATE ASSURANCE**

Up to \$5M ransomware recovery warranty\* for Rubrik Enterprise Edition and Rubrik Cloud Vault.



\*Terms and conditions apply.



rubrik

**Elisabeth Zarate**

Executive Admin EMEA at Rubrik

E [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) W [www.rubrik.com](http://www.rubrik.com)

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\*Terms and conditions apply.



rubrik


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Executive Admin EMEA at Rubrik

E [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) W [www.rubrik.com](http://www.rubrik.com)


**ENJOY THE**  
**ULTIMATE ASSURANCE**

Up to \$5M ransomware recovery warranty\* for Rubrik Enterprise Edition and Rubrik Cloud Vault.




\*Terms and conditions apply.

--

 **rubrik** | **Elisabeth Zarate**  
Executive Admin EMEA at Rubrik  
E [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) W [www.rubrik.com](http://www.rubrik.com)

**ENJOY THE**  
**ULTIMATE ASSURANCE**

Up to \$5M ransomware recovery warranty\* for Rubrik Enterprise Edition and Rubrik Cloud Vault.



\*Terms and conditions apply.

## **EXHIBIT 9**

**Erica B. E. Rogers**

---

**From:** Erica B. E. Rogers  
**Sent:** Friday, July 15, 2022 3:43 PM  
**To:** Erica B. E. Rogers  
**Subject:** FW: Re: Reimbursement

---

**From:** Kate from Forma <kate.swindler@forma-8b435d6acd3d.intercom-mail.com>  
**Sent:** Thursday, July 14, 2022 9:25 AM  
**To:** Nabeil Alazzam <nabeil@forma.ai>  
**Subject:** Re: Re: Reimbursement

**EXTERNAL EMAIL**

This message was sent to the following 4 people: Benefits-EMEA, [support@forma.ai](mailto:support@forma.ai), Denise, Elis email will notify them.

Hi all,

Thank you for your patience!

I checked the payroll reports and found the following totals for each month:

- Nov payroll report : £78
- Dec payroll report : £78
- May payroll report : £39

The July claim has not be included on a payroll report yet as that pay period does not end until July 31. I can confirm the above totals were included for James Hughes in those payroll reports. We don't have a check if James was reimbursed, but we did send those reimbursement amounts in Nov, Dec, and May. Please reach out if you have any further questions, we're happy to help!

Kindly,

Kate



**Kate** from Forma

On Thu, Jul 14, 2022 at 04:00 AM, "Benefits-EMEA" <[benefits-emea@rubrik.com](mailto:benefits-emea@rubrik.com)> wrote:

Hi Forma Team,

We have noticed "James Hughes", Employee ID - 101901, has some issues with the reimbursement. C pending amount is reimbursed? sharing a screenshot for your reference.

Please treat this as an urgent request and share the details with us asap please.

Regards,

Benefits-EMEA

----- Forwarded message -----

From: **Elisabeth Zarate** <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>

Date: Tue, Jul 12, 2022 at 10:49 AM

Subject: Fwd: Reimbursement

To: Benefits-EMEA <[benefits-emea@rubrik.com](mailto:benefits-emea@rubrik.com)>

Hi team,

Could you please verify if the amounts approved in Forma for James Hughes have been reimbursed?

They don't seem to appear on the payslips.

Thanks

----- Forwarded message -----

From: **Elisabeth Zarate** <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>

Date: Tue, Jul 12, 2022 at 10:33 AM

Subject: Fwd: Reimbursement

To: Paolo Galano <[paolo.galano@rubrik.com](mailto:paolo.galano@rubrik.com)>

Hi Paolo,

Could you please check if James Hughes has been reimbursed in his payslips for the above please?

Thanks

----- Forwarded message -----

From: **James Hughes** <[james.hughes@rubrik.com](mailto:james.hughes@rubrik.com)>

Date: Tue, Jul 12, 2022 at 9:23 AM

Subject: Reimbursement

To: Elisabeth Zarate <[elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com)>

Hi Eli

Would you mind checking if this has been reimbursed? I'm sceptical.

Thanks! - James.

--

[https://signatures.rubrik.com/cf/signature\\_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435](https://signatures.rubrik.com/cf/signature_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435)

**James Hughes**

VP Sales Engineering & Enterprise CTO, EMEA at Rubrik

**E** [james.hughes@rubrik.com](mailto:james.hughes@rubrik.com) **M** +44 7970 390120 **W** [www.rubrik.com](http://www.rubrik.com)

[https://signatures.rubrik.com/uc/5de7005ea1062a00b0e93cc7/c\\_621e456c519e080095315193/b\\_621e](https://signatures.rubrik.com/uc/5de7005ea1062a00b0e93cc7/c_621e456c519e080095315193/b_621e)

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[https://signatures.rubrik.com/cf/signature\\_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435](https://signatures.rubrik.com/cf/signature_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435)

**Elisabeth Zarate**

Executive Admin EMEA at Rubrik

**E** [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) **W** [www.rubrik.com](http://www.rubrik.com)

[https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c\\_621e456c519e080095315193/b\\_621e](https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c_621e456c519e080095315193/b_621e)

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[https://signatures.rubrik.com/cf/signature\\_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435](https://signatures.rubrik.com/cf/signature_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435)

**Elisabeth Zarate**

Executive Admin EMEA at Rubrik

E [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) W [www.rubrik.com](http://www.rubrik.com)

[https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c\\_621e456c519e080095315193/b\\_621e](https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c_621e456c519e080095315193/b_621e)

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[https://signatures.rubrik.com/cf/signature\\_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435](https://signatures.rubrik.com/cf/signature_fields/5d95fbaf9e88ad5f0275e97a/RubrikLogo140x40157435)

**Elisabeth Zarate**

Executive Admin EMEA at Rubrik

E [elisabeth.zarate@rubrik.com](mailto:elisabeth.zarate@rubrik.com) W [www.rubrik.com](http://www.rubrik.com)

[https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c\\_621e456c519e080095315193/b\\_621e](https://signatures.rubrik.com/uc/60e2d7e99e4022010eed64b6/c_621e456c519e080095315193/b_621e)


 image.png

 image.png



## **EXHIBIT 10**



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Congrats to our customers and partners on creating inspirational company cultures and a [#GreatPlaceToWork](#) for your employees and future employees! 🏆

🏆👏👏👏 [#culture](#) [#greatplacetowork2022](#) [#peopleandculture](#) [#deib](#)  
[#humanresources](#) [#hr](#)

[Drata](#) [Forma.ai](#) [Salesloft](#) [Instawork](#) [NerdWallet](#) [Collibra](#) [Mercury](#) [Braze](#) [Lattice](#)  
[Greenhouse](#) [Software](#)



👍❤️ 9

1 comment

Reactions



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Comment

Repost

Send



Add a comment...



Most relevant ▾

## **EXHIBIT 11**

## Angela P. Doughty

---

**From:** Angela P. Doughty  
**Sent:** Thursday, December 22, 2022 10:10 AM  
**To:** Angela P. Doughty  
**Subject:** 2022.12.07 Consumer Confusion

---

**From:** Jeff Robinson <[jeff.robinson@forma.ai](mailto:jeff.robinson@forma.ai)>  
**Sent:** Wednesday, December 7, 2022 3:01 PM  
**To:** Michael Buchanan <[michael.buchanan@forma.ai](mailto:michael.buchanan@forma.ai)>  
**Subject:** FW: New submission on HubSpot Form "2021 - Website - Main Contact Page Form"

---

### Jeff Robinson

Manager, Business Development  
[Forma.ai](https://forma.ai) | [647-699-7015](tel:647-699-7015)

---

**From:** HubSpot Forms <[noreply@hubspot.com](mailto:noreply@hubspot.com)>  
**Sent:** Wednesday, December 7, 2022 3:00 PM  
**To:** Jeff Robinson <[jeff.robinson@forma.ai](mailto:jeff.robinson@forma.ai)>  
**Subject:** New submission on HubSpot Form "2021 - Website - Main Contact Page Form"

EXTERNAL EMAIL



---

## New submission on HubSpot Form "2021 - Website - Main Contact Page Form"

---

Page submitted on: [Contact Us - We'd Love to Hear From You » Forma](#)

firstname:

[seannetsai@gmail.com](mailto:seannetsai@gmail.com)

email:

[stsai@clari.com](mailto:stsai@clari.com)

mobilephone:

9259151002

message:

Hi Forma team, I am emailing since my receipt upload is not working. We use Forma at Clari and I'm trying to submit claims for the Professional Dev stipend. Thanks in advance!

View in HubSpot



- **CONTACT**

- [seannetsai@gmail.com](mailto:seannetsai@gmail.com) ([stsai@clari.com](mailto:stsai@clari.com))



- **COMPANY**

- Clari
- (650) 265-2111

**Revenue:**

50000000

**Company size:**

500

**Industry:**

Computer Software

**Location:**

Sunnyvale, California

This message was sent to [jeff.robinson@forma.ai](mailto:jeff.robinson@forma.ai) because your preferences are set to receive notifications like this. You can change it in your [notification preferences](#) page.

[forma.ai](#) (Hub ID: 2815079)

HubSpot, Inc.  
25 First Street, 2nd Floor  
Cambridge, MA 02141

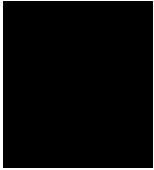
## **EXHIBIT 12**

## Angela P. Doughty

---

**From:** Nabeil Alazzam <nabeil@forma.ai>  
**Sent:** Wednesday, December 21, 2022 11:53 PM  
**To:** Angela P. Doughty  
**Cc:** Michael Buchanan  
**Subject:** Fwd: Forma Card Approval

**Follow Up Flag:** Flag for follow up  
**Flag Status:** Completed



---

**From:** Natasha Inniss <natasha.inniss@clever.com>  
**Sent:** Tuesday, December 20, 2022 2:03:06 PM  
**To:** Nabeil Alazzam <support@forma.ai>  
**Subject:** Forma Card Approval

### EXTERNAL EMAIL

Hello,

I am trying to use my allocated PD budget (\$500) but I received a message that "orma wasn't able to approve the \$499 transaction at THE CRU because you only have \$0 left in your Remote Work Wallet account." This purchase was manager approved and is for [The Cru](#).

--

Thank you,  
**Natasha Inniss**  
Customer Success Manager, Big District Success

**Clever**



[Schedule a meeting!](#)

Ready to set up the Clever portal for students, teachers, and staff? We're here to help! Sign up for our [live workshops](#).



## **EXHIBIT 13**

## Angela P. Doughty

---

**From:** Angela P. Doughty  
**Sent:** Thursday, December 22, 2022 10:07 AM  
**To:** Angela P. Doughty  
**Subject:** FW: Welcome to Forma!

---

**From:** [Lauren.Clasper@nwf.org](mailto:Lauren.Clasper@nwf.org) <[Lauren.Clasper@nwf.org](mailto:Lauren.Clasper@nwf.org)>  
**Date:** Wednesday, December 21, 2022 at 2:55 PM  
**To:** Christina Morina <[MorinaC@nwf.org](mailto:MorinaC@nwf.org)>  
**Cc:** Nabeil Alazzam <[support@forma.ai](mailto:support@forma.ai)>  
**Subject:** Re: Welcome to Forma!

### EXTERNAL EMAIL

Hi Christina,

I am trying to access my Forma account before the end of the year, but it is saying my work email address [clasperl@nwf.org](mailto:clasperl@nwf.org) does not exist. I have purchased something from here a few months ago and was going to try and use up some remaining funds...so I'm not sure what is going wrong?

Please help.

Thanks!



**Lauren Clasper**

she | her | hers

**Digital Marketing Manager, Operations**

National Wildlife Federation

703-438-6032

[www.nwf.org](http://www.nwf.org)

*Uniting all Americans to ensure wildlife thrive in a rapidly chan*

---

**From:** Christina Morina <[MorinaC@nwf.org](mailto:MorinaC@nwf.org)>  
**Sent:** Thursday, September 1, 2022 10:06 AM  
**To:** Lauren Clasper <[Lauren.Clasper@nwf.org](mailto:Lauren.Clasper@nwf.org)>  
**Subject:** Welcome to Forma!

Good Morning,

We have partnered with a company called Forma to administer our wellness program. This benefit allows for benefit eligible employees to use a one-time stipend of \$300 on eligible wellness-expenses (prorated for new hires). Take care of yourself and do something fun! Pick up a new pair of running shoes, go get a massage, or

support your ski or snowboarding addiction. From fitness and health, to family support, to food, to financial wellness, **our wellness program goes beyond the gym**. More details on the program eligible expenses can be found [here](#).

Forma is our all-in-one resource — there are 3 ways you can spend your stipend through Forma:

1. **Forma Store:** Includes a list of pre-approved products and services that can be purchased directly through the store using your stipend. Many of these products are discounted as much as 30%.
2. **Forma Card:** Activate a physical or virtual debit card that allows you to make eligible purchases -- no reimbursement claim required!
3. **Claims Reimbursement:** Purchase eligible items using a personal form of payment and submit a manual claim for reimbursement through payroll.

**To login to Forma:**

Please go to the [login page](#) and click the pink 'Sign In' box. Then enter your company email (not your personal email) address. You'll be directed to use your single sign on credentials.

Also attached is a flyer for more information.

If you have any questions, please feel free to contact Twic's member support team at [support@forma.ai](mailto:support@forma.ai) or via their live chat feature on their website.

We hope you all enjoy this benefit to help you stay well and healthy!

Warmly,  
Christina

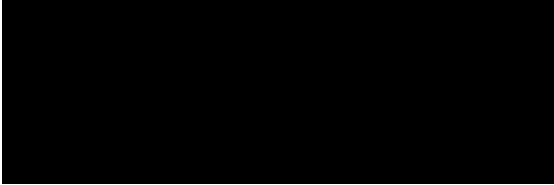
## **EXHIBIT 14**

**Angela P. Doughty**

---

**From:** Nabeil Alazzam <nabeil@forma.ai>  
**Sent:** Friday, December 23, 2022 8:20 AM  
**To:** Angela P. Doughty  
**Cc:** Michael Buchanan  
**Subject:** Fwd: Rubrik forma reimbursement

**Follow Up Flag:** Flag for follow up  
**Flag Status:** Flagged



---

**From:** Vijay Harihara Iyer Sankar <vijay.sankar@rubrik.com>  
**Sent:** Friday, December 23, 2022 8:18 AM  
**To:** Nabeil Alazzam  
**Subject:** Rubrik forma reimbursement

**EXTERNAL EMAIL**

hello,

I am a Rubrik employee. I have 18000 rupees in my Forma account ( which is the maximum for a year and will expire at the end of the year). If I buy an item for more than 18000, and submit the bill, will you reimburse 18K to me?

The item that I have in mind is [Google pixel buds pro](#), which costs around 18999/ Rupees/. Please also confirm if this item is eligible as per Rubrik policy.

regards  
Vijay

## **EXHIBIT 15**

## Angela P. Doughty

---

**From:** Michael Buchanan <michael.buchanan@forma.ai>  
**Sent:** Friday, December 30, 2022 6:44 AM  
**To:** Angela P. Doughty  
**Subject:** FW: New Voicemail from Raitz Propertie (770) 653-9932 to Main Auto Receptionist (Ext. 301) on Thu Dec 29, 2022 13:19

---

**From:** Zoom <no-reply@zoom.us>  
**Sent:** Thursday, December 29, 2022 1:19 PM  
**To:** Michael Buchanan <michael.buchanan@forma.ai>  
**Subject:** New Voicemail from Raitz Propertie (770) 653-9932 to Main Auto Receptionist (Ext. 301) on Thu Dec 29, 2022 13:19

EXTERNAL EMAIL

zoom

SIGN IN

# You have a new shared voicemail

<b>Time</b>	Thu Dec 29, 2022 13:19
<b>From</b>	Raitz Propertie (770) 653-9932
<b>To</b>	Main Auto Receptionist (Ext. 301) (Auto Receptionist)
<b>Duration</b>	00:43

**Voicemail Transcription**

**"This is an unusual call. I found a credit card with the T. W. I see Inc. Name on it to Kim Gunter, K. I am G u n t e r. My understanding is that Forma has bought out. Gw: I see. and i'm just trying this to visa card. I'm just trying to find out how to contact her and get her card back. My number is (770) 653-9932, that's (770) 653-9932. My name is Ron Rates spelled R. A. I T. Z. Thanks. "**

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55 Almaden Blvd  
San Jose, CA 95113



## **EXHIBIT 16**

## Angela P. Doughty

---

**From:** Michael Buchanan <michael.buchanan@forma.ai>  
**Sent:** Thursday, January 12, 2023 7:24 PM  
**To:** Angela P. Doughty  
**Subject:** FW: New Voicemail from (281) 543-4421 to Main Auto Receptionist (Ext. 301) on Wed Jan 11, 2023 13:03

---

**From:** Zoom <no-reply@zoom.us>  
**Sent:** Wednesday, January 11, 2023 1:03 PM  
**To:** Michael Buchanan <michael.buchanan@forma.ai>  
**Subject:** New Voicemail from (281) 543-4421 to Main Auto Receptionist (Ext. 301) on Wed Jan 11, 2023 13:03

EXTERNAL EMAIL

zoom

SIGN IN

# You have a new shared voicemail

<b>Time</b>	Wed Jan 11, 2023 13:03
<b>From</b>	(281) 543-4421
<b>To</b>	Main Auto Receptionist (Ext. 301) (Auto Receptionist)
<b>Duration</b>	00:26

**Voicemail Transcription**

**"Hello! My name is Hope Denton. I'm. Calling, based out of Chicago, Illinois. I just wanted to talk with someone and go over benefits really quickly. Just so we can get a comprehensive plan of what works? What Doesn't My phone? Number (281) 543-4420ne, and give me a call back at your earliest convenient. Thank you so much. "**

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55 Almaden Blvd  
San Jose, CA 95113

## **EXHIBIT 17**



CaptivateIQ

10,511 followers

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We're honored to be among the top 10 Best Small & Medium Places to Work in 2023, according to Glassdoor!

Very cool to join other #technology innovators like Forma.ai, Notion, Ironclad, and more. Congrats to all on this year's list!

See our open positions: <https://lnkd.in/gFWMp-Q>

Check out the #GlassdoorBPTW: <https://lnkd.in/eXgmKix>

#hiring #tech

glassdoor  
BEST PLACES  
TO WORK 2023

Best Small and Medium Companies to Work For | Glassdoor

glassdoor.com • 1 min read

👍❤️ 46

13 reposts

Reactions



I think this is...

Congrats...

Inspiring...

Love this...

I can



Like

Comment

Repost

Send



Comment as Forma.ai...



## **EXHIBIT 18**

